



# UNICO

## Benefits Senior Client Manager

### Job Summary

The Senior Client Manager serves as the primary business contact for the client and is responsible for client satisfaction. The Senior Client Manager is expected to consistently provide excellent customer service to accounts, as well as represent client needs and goals within the organization to ensure quality. This role is expected to establish effective working relationships with internal partners, clients, and carriers. This role will manage a book of business comprised of clients of organizations with 100+ lives and a strong focus on self-funded plans.

### Responsibilities

#### Client Management

- ▶ Proactively and independently manage client relationships on a day-to-day basis.
- ▶ Communicate due dates, timelines, and expectations to clients and partners
- ▶ Make decisions regarding the resolution of client concerns; research and resolve coverage issues, audit issues, and billing discrepancies in a timely manner.
- ▶ Install new group insurance contracts for clients, effectively utilizing resources to match client needs.
- ▶ Administer renewals including preparing appropriate contractual changes.
- ▶ Inform clients of ERISA, COBRA, and FMLA compliance measures.
- ▶ Develop documents, including annual renewal changes, enrollment procedures, miscellaneous benefit changes, and clarifications.
- ▶ Develop and maintain excellent carrier relationships.
- ▶ Maintain agency management and commissions software.

#### Client Retention

- ▶ Execute strategies to strengthen long-term client relationships and ensure continued partnership.
- ▶ Monitor client satisfaction proactively, addressing concerns quickly and effectively to prevent issues from escalating.
- ▶ Analyze client needs, usage trends, and engagement to anticipate risks and implement retention solutions.
- ▶ Provide clients with ongoing education and insights to help them navigate benefit changes and industry developments.
- ▶ Identify opportunities for additional services or coverage enhancements that align with client goals and reinforce retention.

#### Cross Functional Collaboration

- ▶ Collaborate with internal teams to deliver timely, accurate, and high-quality service that supports client loyalty.

- ▶ Maintain open and clear communication channels with internal partners, clients and carriers.
- ▶ Create an employee communication strategy with the client.
- ▶ Prepare appropriate employee communication material to be used by the client and deliver material to the client.
- ▶ Conduct employee meetings and / or webinars as needed.

## Education & Experience

- ▶ Education: Bachelor's degree preferred.
- ▶ Experience: Minimum 3 years of experience in benefits brokerage, insurance or employee benefits customer service, client administration, or a related field preferred.
- ▶ Strong knowledge of employee benefits, self-funding arrangements and group insurance, including underwriting principles, and carrier processes.
- ▶ Ability to interpret and apply benefit-related regulations (e.g., ERISA, ACA) and stay current with industry trends and legislative updates.
- ▶ Licensure: State life and health insurance license, or ability to obtain, required

## Knowledge & Skills

- ▶ Proven ability to manage multiple projects at a time while paying strict attention to detail.
- ▶ Demonstrated ability to communicate and present information professionally and effectively at all levels of the organization.
- ▶ Ability to follow up on activities from start to finish while working independently.
- ▶ Exceptional communication skills, with the ability to explain complex concepts in a clear, client-friendly manner.
- ▶ Alignment with UNICO's core values: professionalism, trust, teamwork, and positivity.
- ▶ Proficient in Microsoft Excel, PowerPoint, Outlook, and a variety of other software, systems, and programs, with the ability to learn new software applications.

## Physical Demands

- ▶ This role's physical exertion is sedentary and within an office environment.
- ▶ Exerting up to 10 pounds of force occasionally and a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects.
- ▶ Substantial movements and repetitive motion of the wrists, hands, and fingers.
- ▶ Individuals should have close visual acuity to perform activities such as preparing and analyzing data and figures; transcribing, viewing a computer, and extensive reading.

**Professional. Team Player. Positive. Trust.**

*UNICO Group is committed to the full inclusion of all qualified individuals. In keeping with our commitment, UNICO Group will take steps to ensure that people with disabilities are provided reasonable accommodation. Accordingly, if reasonable accommodation is required to fully participate in the job application or interview process, to perform the essential functions of the position, and to receive all other benefits and privileges of employment, contact People Operations at [careers@unicogroup.com](mailto:careers@unicogroup.com)*